

APPLICATION FOR RECORDS DISPOSITION STANDARD

INSTRUCTIONS: Prepare in duplicate and forward to the Records Management Analyst, Management Systems Division

3. Dept., Division, Subdivision & Administering Office Address MARTA Finance & Administration Personnel Division 401 West Peachtree St, NE Suite 2200 Atlanta, GA 30308		FOR RECORDS MANAGEMENT DIVISION USE <div style="display: flex; justify-content: space-between;"> Date Received Application No. Date Completed </div> <div style="display: flex; justify-content: space-between;"> AUG 11 1977 77-254 SEP -1 1977 </div>	
4. Person to Contact James A. Merritt		5. Working Title Manager of Benefits	6. Telephone Number 586-5236
7. Action Requested a. <input checked="" type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input type="checkbox"/> Amend Application No. _____ Check One: <input type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
8. Dates of Series Earliest Latest 1950 present	9. Records Series Title (followed by title used in office, if different) MARTA's Employees Union Pension Committee Subject File		
10. Division and Office Function What is the function of the Division and the Office in which this record series is created? <p>The Division of Personnel is responsible for the establishment and administering of personnel procedures for the Authority.</p> <p>The Division of Personnel develops and maintains adequate recruitment sources to meet the manpower needs of the Authority. It maintains personnel records, with the exception of the Division of Transportation and Maintenance. Specifically, it develops, implements, and monitors the Authority's compensation and benefit programs, employee performance evaluation plan, and a continuing employee relations program for personnel at all levels within the Authority. Also, this division monitors and enforces the Authority's Affirmative Action Program.</p>			
11. Record Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. Documents relating to: holding meetings and recording proceedings of meetings of the MARTA Employee's Union Pension Committee. Included are: Union Employees Enrollment records, Group Annuity Plan; general correspondence; employee welfare/pension benefit records (Form D-1) File is arranged: chronological order			
12. Monthly Reference Rate How often are records referred to which are: One to six months old <u>0</u> ; Seven to twelve months old <u>0</u> ; Thirteen to twenty-four months old <u>0</u> ; twenty-five months and older <u>0</u> ?			
13. Annual Rate of Accumulation of Records Letter-size drawers <u>6</u> ; Legal-size drawers _____ ; Shelves _____ ; Other (specify) _____			

YES	NO	14. Questionnaire (Place an "X" in the proper column)
XX		a. Is this the official copy of the series? If not, where is it?
	XX	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
		c. Is this a vital record? Possible
		d. Does this series have historical or long term research value? Possible
	XX	e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
	XX	f. Is the information contained in this series ever published? If yes, attach copy.
	XX	g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy.
	XX	h. Is there a duplication of this series in your office, or in another office or agency? If yes, where?
	XX	i. Is this series (or a major portion of it) regularly microfilmed?
	XX	j. Does the record series result in a computer printout?

15. Retention Requirements

The following requires the series to be kept:

- | | | | |
|--------------------------|--------------|-----------------------------------|--------------|
| a. State Law | _____ years. | d. Audit period | _____ years. |
| b. Statute of limitation | _____ years. | e. Administrative need | 11 years. |
| c. Federal law | _____ years. | f. Federal retention instructions | _____ years. |

Attach copy or excerpt of laws or regulations. Explain administrative need.

Possible reference material

16. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☒ Calendar Year; ☐ Fiscal Year; ☐ Other _____ then,

☒ Hold in the current files area _____ month(s) 1 year(s); then

☒ Transfer to local holding area; hold 10 year(s); then

☐ Transfer to State Records Center; hold _____ year(s); then

☒ Destroy.

☐ Transfer to State Archives for permanent retention.

☐ Other (Specify)

These instructions apply to all prior and future accumulations of the series.

(Indicate briefly rationale for recommendations above/or write additional remarks):

17. APPROVALS

Approved _____ Department Records Management Officer Date 8-2-77	Approved _____ Legal Counsel Date 8-10-77
Approved _____ Division Head/Designee Date 8/3/77	Approved _____ Division of Audit Date 8-11-77
Approved _____ Department Head/Designee Date 8/4/77	Approved _____ Department of Archives and History Date 9-1-77
Approved _____ Records Management Analyst Date 8/7/77	Approved _____ MARTA Management Advisory Committee Date